



**Congregation Beth Am
Legacy Gift Notification Form**

I am/We are pleased to notify Congregation Beth Am of my/our legacy gift and wish for the information below to be kept on file at Beth Am:

Name(s) _____

Address _____

City _____ State _____ Zip _____

Please list me/us on Builders Circle lists as:

Anonymous

I/We have provided for Congregation Beth Am as follows (check appropriate boxes):

- Charitable bequest:
 - Specific Amount
 - Percentage
 - Whatever's left over (residual)
 - If all heirs are deceased (contingent)
 - Charitable Remainder Trust
 - Retirement Plan Designation
 - Insurance Policy Designation
 - Pooled Income Fund Account
 - Other
- [] Estimated Gift Value (optional)

Name of person or entity responsible for transfer: _____

Phone number of same: _____

I/We would like to craft a personal message to be included in Beth Am's Book of Legacy, on display in the Sanctuary building.

My/our gift is designated to _____ (unless otherwise designated, legacy gifts are directed to Beth Am's general endowment, the Fund for the Future.)

I/We understand that this letter is not legally binding and can be withdrawn or altered at any time.

Signature

Date

Signature

Date

Please mail or email your completed form to:

Mandy Eisner, Director of Development

Congregation Beth Am, 26790 Arastradero Road, Los Altos Hills, CA 94022

mandy_eisner@betham.org